

## 2024-25 DEPENDENT VERIFICATION WORKSHEET (V1)

You may attach additional pages as necessary to this form. If you do so, please be sure to include the Student's Full Name and Student ID number on *each page attached*.

|   |                      |                |  |
|---|----------------------|----------------|--|
| Student's Last Name                             | Student's First Name | Student's M.I. | AU Student ID#                           |
| Student's Street Address (include apt. no.)     |                      |                | Student's Date of Birth                  |
| City  | State                | Zip Code       | Student's Email Address                  |
| Student's Home Phone Number (include area code) |                      |                | Student's Alternate or Cell Phone Number |

[illegible]

## **Income Verification**

The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the parents was not available or could not be used, the parents should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

**Please complete the following:**

| <b>Student</b>   | <b>Parent(s)</b>  |
|--|---|
| I have successfully used the FAFSA's Direct Data Exchange to retrieve my income information for the FAFSA. No other documentation is needed for income verification.   | I/we have successfully used the FAFSA's Direct Data Exchange to retrieve my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction. No other documentation is needed for income verification.  |
| I am unable to use the FAFSA's Direct Data Exchange to transfer my income information. I have attached a copy of my 2022 signed Tax Return here. (If you have not retained a copy of your 2022 tax return, you can request a copy of your 2022 Tax Return Transcript to be mailed to you (instructions below). | I am/we are unable to use the FAFSA's Direct Data Exchange to transfer my income information. I have attached a copy of my 2022 signed Tax Return here. (If you have not retained a copy of your 2022 tax return, you can request a copy of your 2022 Tax Return Transcript to be mailed to you (instructions below). |
| I filed an Amended Income Tax Return, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification.   | I/we filed an Amended Income Tax Return, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification.   |
| I did not and am not required to file a 2022 Federal Tax Return. I will complete the Tax Return Non-Filer section below.   | I/we did not and am not required to file a 2022 Federal Tax Return. I will complete the Tax Return Non-Filer section below.   |

A 2022 Federal Tax Return Transcript may be obtained from the IRS through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

## **Tax Return Non Filers**

Complete this section if you, the student and/or your parent(s) will not file and are not required to file a 2022 income tax return with the IRS, but earned income from work in 2022. More information about who is required to file can be found at [www.IRS.gov](http://www.IRS.gov). If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid.

1. In the following table, please list all earnings from work during 2022 **and attach a 2022 W2 or 1099-MISC for each line item**. More information about who is required to file can be found at [www.IRS.gov](http://www.IRS.gov). If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid.

Your application cannot be considered complete until all earnings from work can be verified with a W2 or 1099-MISC.

| Source of Income from Work in 2022 | Student | Parent(s) | IRS W-2 or 1099 Attached? |
|------------------------------------|---------|-----------|---------------------------|
|                                    | \$      | \$        |                           |
|                                    | \$      | \$        |                           |
|                                    | \$      | \$        |                           |
|                                    | \$      | \$        |                           |
|                                    | \$      | \$        |                           |
|                                    | \$      | \$        |                           |
| Total Income from Work in 2022     | \$      | \$        | —                         |

- If you did not retain copies of your 2022 W-2(s), you can obtain a 2022 Federal Wage and Income Transcript from the IRS, call 800-908-9946 or go to [www.IRS.gov](http://www.IRS.gov). There, click on the “Get Your Tax Record” link. Follow the on-screen instructions to log in or to create an IRS account. Once your account is created, make certain to request the 2022 “Wage and Income Transcript,” and submit this to the Financial Aid Office.
2. For both parent and student non-taxfiler, provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

Check here if confirmation of non-filing is provided

Check here if confirmation of non-filing is provided.

Check here if confirmation of non-filing will be provided later.

## **Verification of Other Untaxed Income**

Complete this section for you and your parent(s). Please indicate “zero” or “N/A” if not applicable. DO NOT LEAVE ANY SECTION BLANK.

1. **If you and your parent(s) did not have any source of income from work in 2022, please attach a statement describing how your family met its living expenses in 2022.**
2. **Payments to tax-deferred pension and retirement savings** List any payment (direct or withheld from earnings) to tax deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d codes D, E, F, G, H, and S.

| Name of Person (Student or Parent) Who Made the Payment       | Total Amount Paid in 2022 |
|---|---------------------------|
|   | \$                        |
|   | \$                        |
|   | \$                        |
|   | \$                        |
|   | \$                        |
|   | \$                        |
| Total Payments to Tax-deferred Pension and Retirement Savings | \$                        |

## **Certification and Signature**

I certify that all of the information reported on this worksheet is complete and correct. The student and one parent must sign this worksheet.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

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Print Student's Name

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Print Parent's Name

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Student's Signature

Date

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Parent's Signature

Date